



Sumter County Economic Planning and Marketing





Qualification Presentation September 29, 2009


 SPG Strategic Planning Group, Inc.

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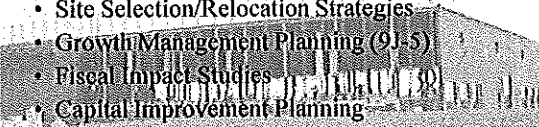
26 Years Strong


PLANNING/ECONOMICS <ul style="list-style-type: none"> • Economic Development • Redevelopment Planning • Tourism Development • Comprehensive Planning • Site Relocation • Development Economics 	STRATEGIC PLANNING <ul style="list-style-type: none"> • Social and Economic Development Programs • Consensus Planning and Implementation Strategies • Environmental Analysis and Mediation • Public Policy • Affordable Housing
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Services — Planning / Economic Studies




- Economic Development Organization Studies
- Economic Development Strategic Planning
- Site Selection/Relocation Strategies
- Growth Management Planning (91.5)
- Fiscal Impact Studies
- Capital Improvement Planning
- Workforce Development
- Grants/Budgetary/Funding Studies

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Key Staff


- **Robert Gray, AICP** ~ 30+ years Economic Development, Market & Financial Feasibility, and Comprehensive Planning Experience:
 - FEDC
 - Jacksonville Economic Development Council (3 mayors)
 - Volusia County ED Reorganization Plan and ED Strategic Plan
 - Ormond Beach ED Strategic Plan
 - Deltona ED Strategic Plan
 - Pasco ED Strategic Plan
 - Polk County ED Strategic Plan
 - Clay County ED Strategic Plan
 - Winter Haven ED Strategic Plan
 - Titusville ED Program



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Key Staff


- **Tony Mondae** ~ 30+ years Economic Development and Market & Financial Feasibility experience. Directed RSH Planning and Economic Development/Market Research Practice.
 - Orlando Central Park
 - Jacksonville International Industrial Park
 - Ormond Beach ED Strategic Plan
 - Manatee County ED Strategic Plan
 - Lee County ED Strategic Plan
 - St. Johns County ED Vision Program



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Key Staff

- **Mike Plummer** ~ former Director of KPMG's Southeast Regional Real Estate Consulting Practice. Conducted extensive market research and bonding studies related to industrial distribution space nationally. Served on the Florida Governor's Council of Economic Advisors.
- **Dave Howard** ~ former Director of Securitization of Corporate Bonds for JPMorgan. Also directed Plantec (RSH) real estate market feasibility practice.



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Economic Development Experience

Map of Florida showing Economic Development Experience by county. The map is shaded in various tones of gray to represent different levels of experience. Labels for counties include: Escambia Co., Leon County, Northwest FL, Nassau County, Duval Co., Jacksonville FL, Jacksonville Beach, Clay County, St. Johns County, Palm Beach, Volusia County, Brevard, Orlando, DeSoto, Cocoa, Brevard, Melbourne, St. Petersburg, Pinellas, Hillsborough, Manatee, Polk, Collier, Lee, and Monroe. Some labels are followed by a number in parentheses, indicating a specific count or metric.

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Office Feasibility



- Feasibility Studies for over 25 million square feet
- Industrial Feasibility for over 35 million square feet



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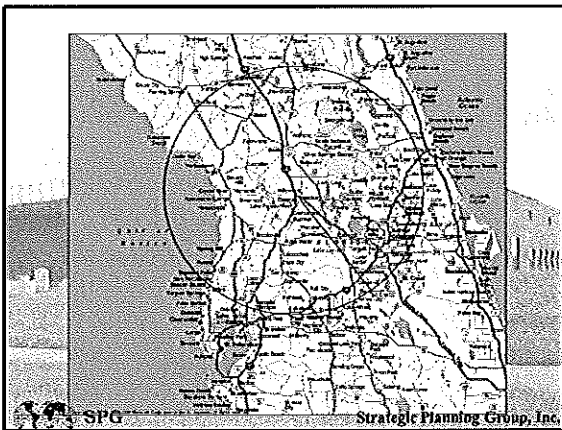
Developer Experience

- Prudential Life Insurance
- Arvida
- LJ Hooker
- Cadillac Fairview
- The Rank Organisation
- American Express
- Bank of America
- Forest City REIT
- Pegasus Aviation Development
- Merrill Lynch
- Portman Companies
- Wilma International



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Top Site Selection Factors

1. Highway Accessibility
2. Labor Costs
3. Availability of Skilled Labor
4. State and Local incentives
5. Availability of high-speed internet access
6. Corporate Taxes
7. Occupancy or construction costs
8. Proximity to major market
9. Energy availability and costs




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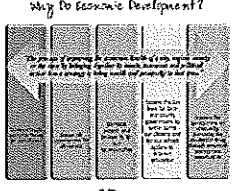
Issues

- Defining Economic Development
- What do we have to market?
- Existing Inventory?
- Office and/or Industrial Parks
- Future Development Options (5 year plan)
- HB 697 (Energy, Carbon Footprint)
- EAR/Comprehensive Plan
- Hometown Democracy
- Gasoline over \$5/gallon


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What is Economic Development

- Is it office and industrial development?
- Is it eco tourism?
- Is it rural stewardship?




Why Economic Development?

The power of capturing the economic benefits of new development is the key to achieving greater economic growth and sustained rural development. A strong rural economy is the key to a strong future.


Economic Development

Rural Stewardship


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Economic Development Today

- It's Data, Data, Data
- It's Inventory of Available Buildings, Business/Industrial Parks, Developable Parcels
- It's Growth Management Planning (Future Land Use, Infrastructure)
- It's Workforce Development (labor)
- It's Land Development Regulations
- It's Partnerships and Marketing


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What do we have to offer?

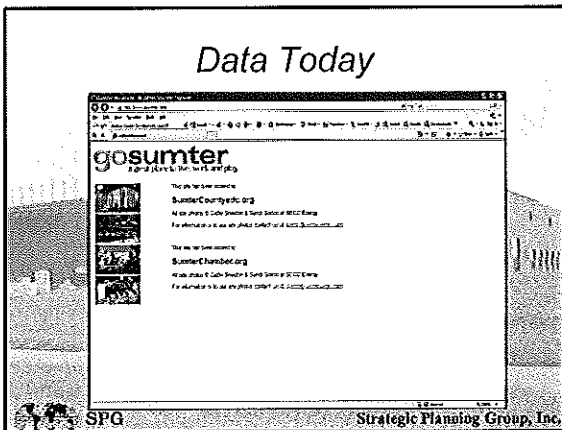
- Great Transportation Corridors
 - Turnpike
 - I-10
 - CSX Railroad
- Villages
- Proximity to three MSAs
 - Orlando
 - Tampa
 - Marion



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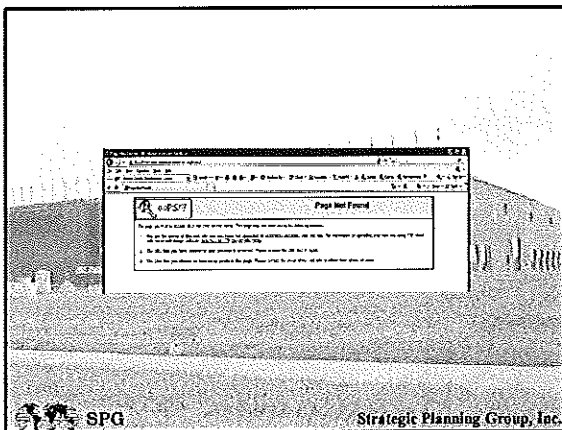
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Data Today



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Problem

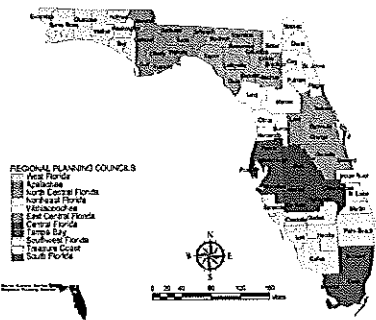
- Outside of Central Florida, who knows about Sumter County?
- Florida Enterprise Considers Sumter Part of Central Florida
- Yet State Considers it part of Withlacoochee Region
- Villages - Orlando Market?
- Lake County Part of Metro Orlando (fastest growing)
- Pasco, Pasco and Hernando part of Tampa Bay Partnership



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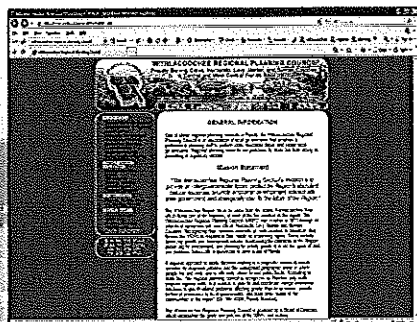
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Florida Regional Planning Councils



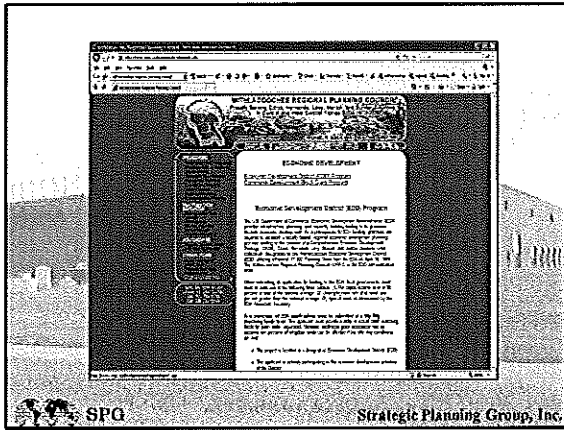
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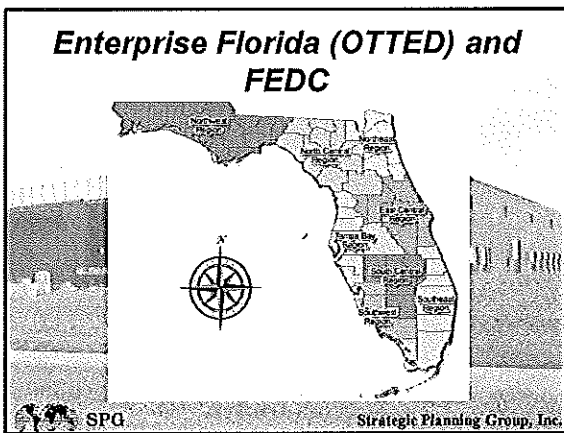
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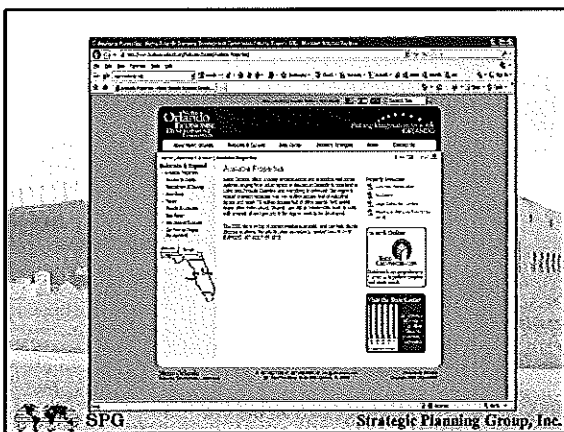




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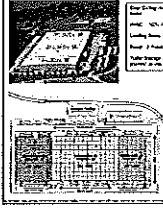

DISTRIBUTION


While Circuit City is a leader in the distribution of consumer electronics, it is not alone. In fact, it is one of the most competitive in the industry. The company's success is due to its efficient distribution system, which is the result of its strategic planning and execution.



FORMER CIRCUIT CITY DISTRIBUTION CENTER



706,560 SF

The former Circuit City Distribution Center is a large, modern building that is currently being converted into a new distribution center. The building is located in a prime location and is surrounded by other commercial buildings. The conversion project is being completed by Strategic Planning Group, Inc.



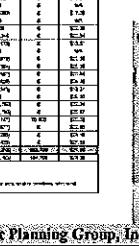
Orlando Economic Development Commission



The Orlando Economic Development Commission is a public entity that is responsible for promoting economic development in the city of Orlando. The commission is composed of members from the city government and the private sector.



Orlando Office Market Statistics

The following table provides a summary of the office market statistics for the city of Orlando. The data is presented in a table with columns for the year, the number of offices, the total square footage, and the average office size.

Year	Number of Offices	Total Square Footage	Average Office Size
2000	1,200	1,200,000	1,000
2001	1,300	1,300,000	1,000
2002	1,400	1,400,000	1,000
2003	1,500	1,500,000	1,000
2004	1,600	1,600,000	1,000
2005	1,700	1,700,000	1,000
2006	1,800	1,800,000	1,000
2007	1,900	1,900,000	1,000
2008	2,000	2,000,000	1,000
2009	2,100	2,100,000	1,000
2010	2,200	2,200,000	1,000
2011	2,300	2,300,000	1,000
2012	2,400	2,400,000	1,000
2013	2,500	2,500,000	1,000
2014	2,600	2,600,000	1,000
2015	2,700	2,700,000	1,000
2016	2,800	2,800,000	1,000
2017	2,900	2,900,000	1,000
2018	3,000	3,000,000	1,000
2019	3,100	3,100,000	1,000
2020	3,200	3,200,000	1,000




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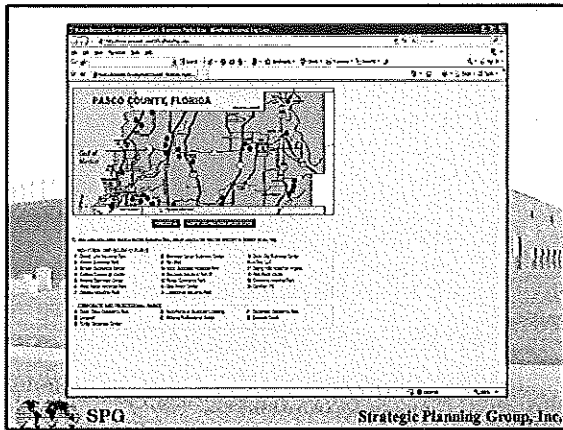
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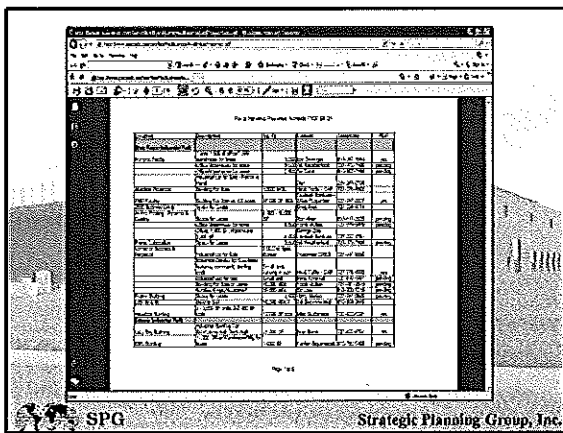
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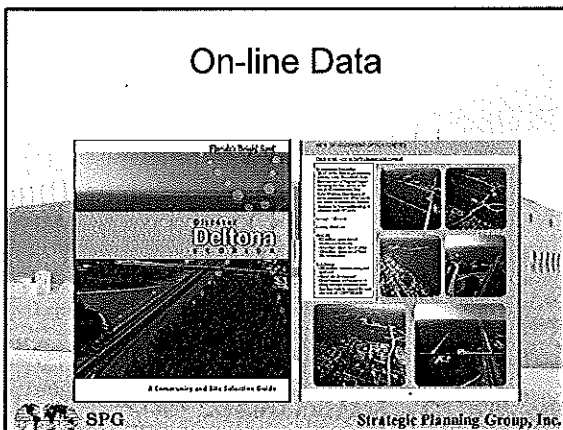
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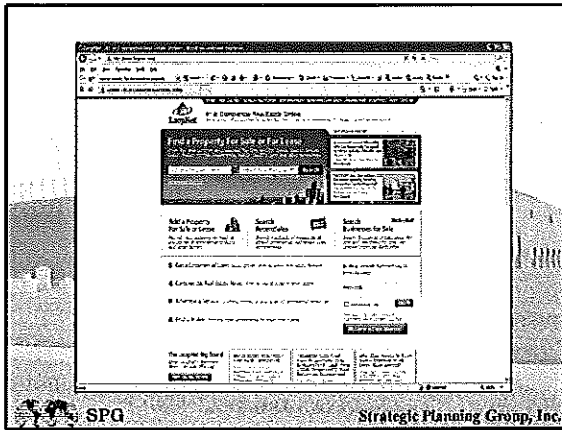




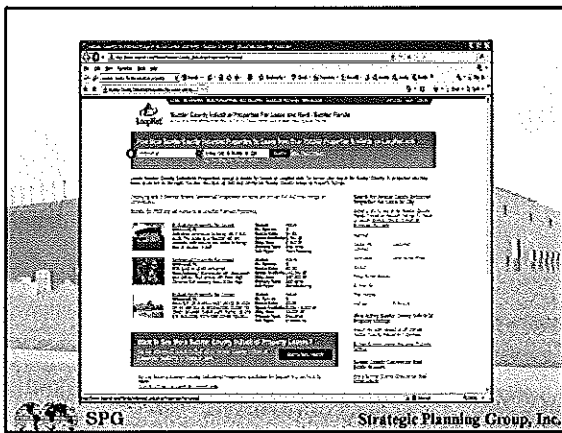






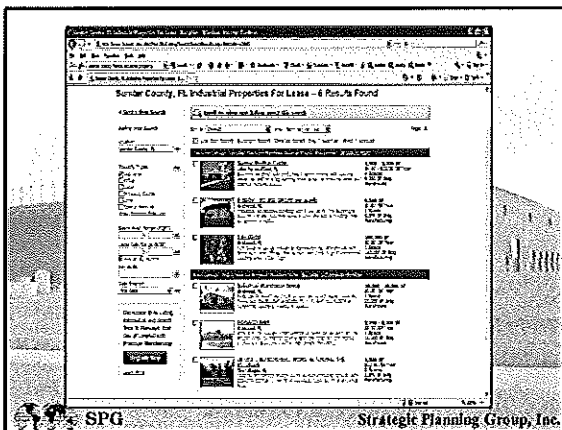
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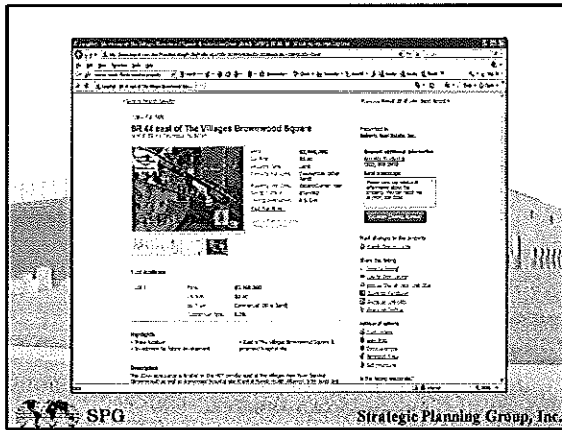
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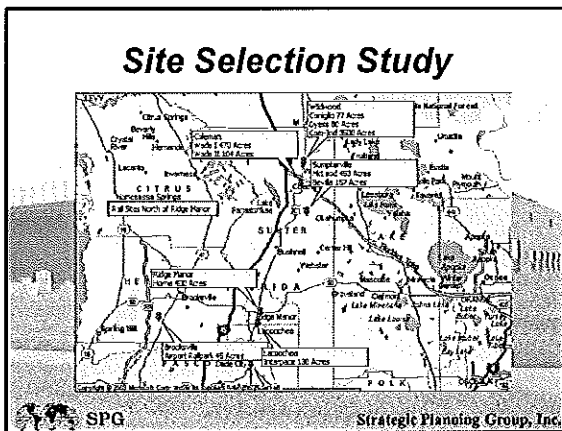
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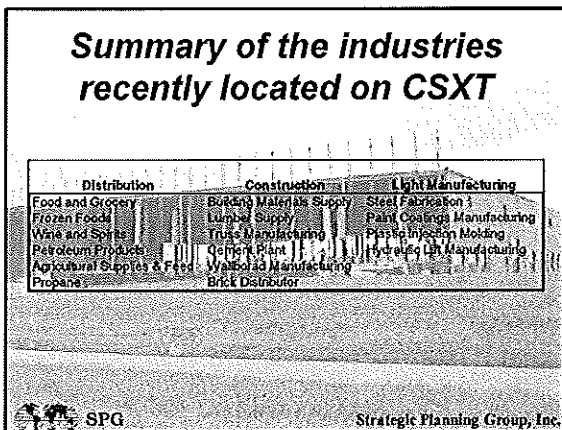


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Leaders - The SPG Team

- Economic Development Planning
- Real Estate Market Analysis
- Real Estate Economics
- Corporate Site Selection
- Economic Development Incentives
- Fiscal Impact Studies
- Land planning, site planning, engineering, GIS




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DISCUSSIONS





1 (800) 213 - PLAN

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ULI Classifications

- Warehouse Distribution
- Manufacturing
- Flex
- Multi-tenant
- Freight Forwarding
- Data Switch Center
- Office/Commercial



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Site Needs

- Net, contiguous acreage in large, flat symmetrical configuration
- Minimal development constraints
- Access to workforce
- Sufficient transportation system
- Proximity to Interstate, rail, airport
- Available utilities
- Location within functioning office/industrial park
- Free from encroachment



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Discussion of Types of Industrial

- Warehousing represents over 55% of the entire national inventory of Industrial real estate
- Manufacturing occupies about 30% of national industrial real estate
 - Light manufacturing
 - Heavy manufacturing
 - Airport hangar
- Flex is the 3rd primary category of industrial real estate
 - High curb appeal
 - Flexible design
 - High percentage of office
- Multi-Tenant
 - Small warehouse, light manufacturing



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Land Use Issues

- Regional Warehouse – sensitive, located near transportation, areas of high total retail spending, blue collar workers
- Heavy Distribution – sensitive near highways and airports
- Heavy Manufacturing – Very sensitive
- Light Manufacturing – sensitive but need to locate near employment



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Land Use Issues

- R&D Flex – not sensitive (more like office) with high outside finish
- Office Showrooms – not sensitive but more than R&D due to delivery trucks and lighting
- Multi-tenant – sensitive; most like small warehouses (trucks) and outside finishing is not a high finish like flex



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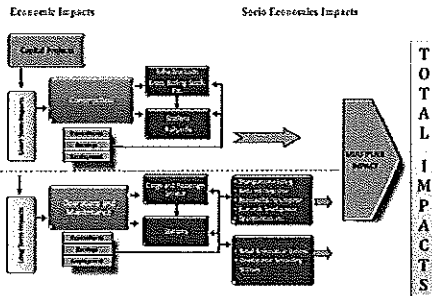
Rail

- Research – no real affinity
- Clean industries like electronics – little except in terms of containerized volumes moving long distances on fast rail services
- Warehouse – medium usually newsprint, canned goods and processed agricultural
- Light manufacturing – some but not major factor
- Heavy manufacturing – yes
- Flex – no real affinity



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RAIL SOCIO ECONOMIC IMPACTS



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